

CLAIMS

1  
2 1. A computer-implemented method of managing a call center  
3 using relationships, said call center including a plurality of  
4 resources for handling telephone calls and communication  
5 contacts, said method comprising:

6 establishing call center resource data corresponding to said  
7 plurality of resources available within said call center;

8 presenting to a user said plurality of resources defined by  
9 said resource data;

10 receiving user selections of selected resources from said  
11 plurality of resources presented to said user;

12 assigning said selected resources to a relationship profile;

13 assigning a relationship key field corresponding to said  
14 relationship profile to said call center resource data for each  
15 of said selected resources assigned to said relationship profile;

16 and

17 using said relationship key field to manage said call  
18 center.

1 2. The method of claim 1 wherein said call center resource  
2 data is organized by function into a plurality of resource  
3 categories, further including the steps of:

4 presenting ~~to~~ said user said plurality of resource  
5 categories; and

6 receiving a user selection of a selected resource category,  
7 wherein said plurality of resources within said selected resource

8 category are presented for selection by said user.

1 3. The method of claim 2 wherein said plurality of  
2 resource categories include inbound dialed number identification  
3 service (DNIS), queues, agent workgroups, individual agents,  
4 campaigns, and call tables.

1 4. The method of claim 1 wherein using said relationship  
2 key field to manage said call center includes:

3 presenting a user with a plurality of statistics display  
4 options corresponding to a plurality of resource relationship  
5 profiles;

6 receiving a user selection of a selected statistics display  
7 option corresponding to a selected resource relationship profile;

8 obtaining call center statistics from said plurality of  
9 resources having a matching resource relationship key field  
10 matching a selected resource relationship key field of said  
11 selected resource relationship profile; and

12 displaying said call center statistics from said plurality  
13 of resources having said matching resource relationship key  
14 field.

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1 5. The method of claim 1 wherein said relationship key  
2 field is used to control defining of call center strategies.

1           6.    A computer-implemented method of managing strategies  
2   and actions in a call center, said method comprising:  
3           establishing action detail data defining generic actions  
4   that can be taken in said call center;  
5           establishing goal data defining goals that can be set within  
6   said call center;  
7           presenting to a user said generic actions defined by said  
8   action detail data;  
9           receiving at least one user selection of a selected generic  
10   action from said generic actions;  
11           displaying action detail data for said selected generic  
12   action;  
13           receiving user-defined action detail data specific to said  
14   call center;  
15   → adding said user defined action detail data to said generic  
16   action detail data to create an available action;  
17           presenting to said user said goals defined by said goal  
18   data;  
19           receiving at least one user selection of a selected goal  
20   from said goals;  
21           receiving at least one user-defined threshold for said  
22   selected goal;  
23           receiving a user selection of at least one selected  
24   available action from said available actions; and  
25           assigning said at least one selected available action to  
26   said at least one user-defined threshold for said selected goal

27 such that said selected available action occurs when each said at  
28 least one user-defined threshold is reached.

1 7. The method of claim 6 wherein said at least one user-  
2 defined strategy threshold includes multiple levels of user-  
3 defined strategy thresholds, and wherein at least one of said  
4 available actions is selected and assigned to each of said user-  
5 defined strategy thresholds.

1 8. The method of claim 7 wherein said multiple levels of  
2 strategy thresholds include an optimization minimum, an  
3 optimization realization, and an optimization maximum.

1 9. The method of claim 6 wherein said goals are organized  
2 in goal categories, and further including the step of:  
3 presenting said goal categories to said user;  
4 receiving a user selection of a selected goal category from  
5 said goal categories, wherein said goals within said selected  
6 goal category are presented for selection by said user.

1 10. The method of claim 6 wherein a plurality of selected  
2 goals, user-defined thresholds, and selected available actions  
3 are received and assigned to create at least one strategy  
4 profile.

1 11. The method of claim 10 wherein a library of strategy

2 profiles are created such that said user can select a strategy  
3 profile from said library of strategy profiles depending upon a  
4 desired strategy to be implemented in said call center.

1 12. The method of claim 6 wherein a plurality of available  
2 actions are created.

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1 13. A method of monitoring and presenting call center  
2 statistics in a call center, said method comprising:  
3 establishing a plurality of resource relationship profiles  
4 defining a plurality of relationships between call center  
5 resources;  
6 establishing a plurality of call center strategy profiles  
7 defining a plurality of call center strategies, each of said call  
8 center strategies including a plurality of goals having at least  
9 one user-defined strategy threshold;  
10 receiving call center statistic data pertaining to said call  
11 center resources;  
12 presenting a user with a plurality of statistics display  
13 options corresponding to said resource relationship profiles;  
14 displaying said call center statistics data pertaining to  
15 said call center resources assigned to said resource relationship  
16 profile corresponding to a selected statistics display option  
17 selected by a user from said plurality of statistics display  
18 options; and  
19 providing an indication when said user-defined strategy  
20 threshold of one of said plurality of goals has not been reached.

1 14. The method of claim 13 wherein said call center  
2 statistics data includes call center queue statistics data.

1 15. The method of claim 14 wherein said call center queue  
2 statistics data is organized and displayed according to call

3 center tasks.

1 16. The method of claim 15 wherein said call center tasks  
2 include inbound, outbound, e-mail and web chat.

1 17. The method of claim 15 wherein said queue statistics  
2 data is further organized and displayed according to task classes  
3 within each of said call center tasks, and further including the  
4 steps of:

5 presenting said user with a plurality of task statistics  
6 viewing options corresponding to each of said task classes,  
7 wherein said contact statistics data within at least one of said  
8 task classes corresponding to a selected task statistics viewing  
9 option is displayed.

1 18. The method of claim 17 further including the steps of:

2 presenting said user with task statistic viewing option  
3 preferences, allowing said user to create a user-defined task  
4 statistics viewing option.

1 19. The method of claim 17 wherein said task classes  
2 include service level, volumes, agent, results, routing and IVR.

1 20. The method of claim 13 further including the step of:

2 presenting said user with a plurality of view formats  
3 pertaining the level of detail and format of said call center



1 25. A call center resource relationship management system  
2 for use in a call center, said call center including a plurality  
3 of resources used for handling telephone calls, said system  
4 comprising:

5 call center resource data defining a plurality of call  
6 center resources in said call center; and

7 a relationship manager, responsive to a user input, for  
8 accessing said call center resource data, for creating a  
9 graphical user interface presenting said call center resources  
10 defined by said call center resource data to said user, for  
11 assigning user-selected resources to a relationship profile, and  
12 for associating a relationship key field to said call center  
13 resource data corresponding to each of said user-selected  
14 resources.

1 26. The system of claim 25 wherein said resources are  
2 organized into resource functional categories including at least  
3 one of agents, agent workgroups, devices, queues, applications,  
4 campaigns, and call tables.

1 27. The system of claim 25 wherein said system is  
2 implemented on at least one personal computer utilizing a  
3 WINDOWS-based operating system.

1        28. A call center strategy and action management system for  
2 use in a call center, said system comprising:

3        action detail data defining a plurality of generic actions  
4 that can be taken within said call center;

5        an action builder, responsive to a user input, for accessing  
6 said action detail data, for creating a graphical user interface  
7 presenting said generic actions to a user for selection, for  
8 combining user-defined specific action details with user-selected  
9 generic actions to build user-defined available actions in said  
10 call center;

11       goal data defining goals to be achieved within said call  
12 center; and

13       a strategy manager, responsive to user input, for accessing  
14 said goal data, for creating a graphical user interface  
15 presenting said goals and said available actions to said user for  
16 selection, and for assigning at least one user-defined threshold  
17 to a user-selected goal and for assigning at least one user-  
18 selected available action to said user-defined threshold such  
19 that said user-selected available action will occur when said  
20 user-defined threshold is met.

1       29. The system of claim 28 wherein said goals are organized  
2 according to goal categories including at least one of system  
3 event goals, service level goals, volume goals, agent goals,  
4 device goals and time of day goals.



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1 33. A call center management system for managing a call  
2 center including a plurality of resources used for handling  
3 telephone calls, comprising:  
4 call center resource data defining a plurality of call  
5 center resources in said call center;  
6 a relationship manager, responsive to a user input, for  
7 accessing said call center resource data, for creating a  
8 graphical user interface presenting said call center resources  
9 defined by said call center resource data to said user for  
10 selection, for assigning user-selected resources to a  
11 relationship profile, and for associating a relationship key  
12 field to said call center resource data corresponding to each of  
13 said user-selected resources;  
14 action detail data defining a plurality of generic actions  
15 that can be taken within said call center;  
16 an action builder, responsive to a user input, for accessing  
17 said action detail data, for creating a graphical user interface  
18 presenting said generic actions to a user for selection, for  
19 combining user-defined specific action details with user-selected  
20 generic actions to build user-defined available actions in said  
21 call center;  
22 goal data defining goals to be achieved within said call  
23 center; and  
24 a strategy manager, responsive to user input, for accessing  
25 said goal data, for creating a graphical user interface  
26 presenting said goals and said available actions to said user for

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27 selection, and for assigning at least one user-defined threshold  
28 to a user-selected goal and for assigning at least one user-  
29 selected user-defined available action to said user-defined  
30 threshold such that said user-selected user-defined available  
31 action will occur when said user-defined threshold is met.

1 34. The call center management system of claim 33 further  
2 including:

3 statistics data representing statistics pertaining to  
4 resources in said call center; and

5 a statistics display manager, responsive to user input, for  
6 monitoring said statistics and for creating at least one  
7 graphical user interface displaying said statistics in at least  
8 one user-defined format, wherein said statistics display manager  
9 accesses said strategy profiles, compares said statistics with  
10 said at least one user-defined threshold, and provides an  
11 indication in said graphical user interface when said threshold  
12 has not met.

1 35. The call center management system of claim 34 wherein  
2 said user-defined format is based upon one of said relationship  
3 profiles.

1 36. The system of claim 33 wherein said system is  
2 implemented on at least one personal computer utilizing a  
3 WINDOWS-based operating system.